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Approved For Release 2003/05/05 : CIA-RDP84-00780R002400020062-8

26 March 1968

MEMORANDUM FOR: Deputy Director for Support

THROUGH : Director of Personnel

SUBJECT : Age and Service Requirements for Participation
in the USDA and USIA Retirement and Re-
employment Rights Program

1. This memorandum contains information only on the subject in response to your request.

2. The Retirement Counseling and Placement Staff (RCPS) has been in touch with the USDA since the first announcement of its unique retirement with re-employment rights program in August 1967. In recent months, through our normal contacts with USIA, RCPS was made aware of that agency's intention to attempt an effort similar to that of USDA. Both of these developing programs have been kept under scrutiny by the RCPS in behalf of the Agency and its expanding retirement interests.

3. The RCPS has two proposals for similar types of efforts which are well advanced. These have been mentioned to the Director of Personnel and his staff and have been discussed to a limited extent. It is anticipated that these proposals will be forwarded during the first week of April.

4. The following details are in direct response to the request for information on "age and employment limitations", USIA and USDA. The USAF Systems Command has also launched a similar program from which details are included.

USDA	Age: Those over 68 are excluded. Service: No requirements stipulated.
USIA Civil Service Type Employees	Age: Those over 67 are excluded. Service: Must be eligible for optional non-reduced annuity.
Foreign Service Type Career Officers	Age: Those over 59 are excluded. Service: Must be eligible for optional non-reduced annuity.
Foreign Service Staff Type	Age: Those over 67 are excluded. Service: Must be eligible for optional non-reduced annuity.
USAF Systems Command	Age: None prescribed. Service: No limitations stipulated.

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GROUP 1
Excluded from automatic
downgrading and
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26 March 1968

MEMORANDUM FOR: Chief, Retirement Counseling Staff

SUBJECT : Trial Retirement; U.S. Department of
Agriculture

REFERENCE : Memorandum to [] same subject,
17 August 1967

1. Reference, which was prepared on 17 August 1967, at the request of Chief, RCPS described the U.S. Department of Agriculture trial retirement experiment. Attached to that memo were the USDA announcements of their program.

2. Since that time we have continued to follow this subject in our evolving plans, anticipating the possibility of its use as an incentive in our program.

3. Mr. James Entwistle, of USDA (111-7661) who heads this project, has furnished us with additional background on the USDA effort. Following the appearance of an item in the Washington Star on 20 March 1968, (copy attached) I obtained the following information by telephone from Mr. Entwistle.

(a) In the original USDA experiment the "retirement with reemployment rights" program was "open to all comers." USDA agencies now using the plan, however, are reviewing all applications for participation in the program and are selecting those who are to participate.

(b) The agreement signed with the employee is a simple, one paragraph document.

(c) The agreement provides that a person may return to his old grade, but not necessarily to the same job.

(d) The status of the employee is that of a retiree; he is not on LWOP or any leave status. If he returns to USDA, he follows established procedures for reemployment of annuitants.

(e) There have been no complaints to date from employees or from employers using the plan. Some are expected sooner or later, however.

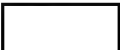


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Retirement Counseling and Placement Staff

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25 March 1968

MEMORANDUM FOR THE RECORD

SUBJECT: USIA Trial Retirement Program

1. On 19 January 1968, the undersigned discussed with Mr. Lawrence Norrie of USIA, Chief of the Retirement Assistance Program, their planning to provide broader pre-retirement counseling and assistance programs. As compared to our planning for varied pre-retirement counseling services, the USIA effort is limited in scope to a main effort in the job placement assistance area. USIA's effort is patterned after the Department of State employment assistance program. Both USIA and State do not plan to provide individual personal counseling as part of their program. In addition to the USIA placement assistance program, Mr. Norrie stated that he planned to put on a pre-retirement information seminar in early April 1968 which would be open to all interested USIA personnel. Mr. Norrie also advised me that USIA was seriously considering establishing a trial retirement option patterned after the Department of Agriculture experiment. As of January, however, he was not certain how they would apply the trial retirement option but would provide us with information when details were finalized.
2. On Tuesday, 19 March 1968, USIA approved the establishment of the USIA trial retirement option. Mr. Norrie advised me that he would provide us with copies of the USIA internal notices and other data which outlined their program, criteria for eligibility, etc. Mr. Norrie was invited to attend our retirement information seminar on 25 March. He told me that he would bring the USIA data with him when he came to the seminar.
3. On 25 March Mr. Norrie was indisposed and could not attend the seminar. I contacted his office and spoke to his assistant (Mrs. Katzspaulding) and asked her if we could have the trial retirement information soonest. She was aware that Mr. Norrie had planned

to hand carry the data and stated that it was being mailed. I asked her if she could give me basic information regarding the eligibility criteria and any other highlights. She was most cooperative and provided the following information:

USIA has two types of retirement systems for their appointees--one system covers their regular Civil Service type employees who are retired in accordance with normal CSR system provisions. The trial retirement option is open to any Civil Service employee who meets CSR criteria for an optional non-reduced annuity (i. e. - 60 years old with 20 or more years of service, 55 years with 30 or more or 62 years with 5 or more years) but who has not reached their 67th birthday. Mandatory retirement is age 70.

The other system covers their Foreign Service careerists:

(a) Foreign Service Career Reserve Officers: Any career officer eligible for a non-reduced annuity may apply if they have not reached their 59th birthday. She made a most interesting comment regarding this group of retirees. She said that USIA had established 60 years of age for mandatory retirement for this group but the USIA legal counsel now questions the legality and enforceability of the policy. USIA apparently adopted the policy without clear legal authority but under discretion of the Director USIA's authority. She assumed that the issue will be clarified when a 60 year old Foreign Service Career Officer refuses to retire at age 60 and tests the authority. USIA is now using the "you are expected to retire at age 60," approach.

(b) Foreign Service Staff Employees: Personnel in these categories are handled in the same manner as CS employees. They are eligible for the trial retirement option if they are eligible for a non-reduced annuity and are under 67 years of age. Mandatory retirement is age 70.



Deputy Chief
Retirement Counseling & Placement Staff

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22 March 1968

MEMORANDUM FOR: Chief, Retirement Counseling and Placement Staff

SUBJECT : Trial Retirement Plan of Air Force Systems Command

1. On 21 March the Air Force Systems Command use of the "trial retirement" plan was discussed by phone with Mr. Charles W. King, Director of Civilian Personnel, AFSC, Andrews AFB (Interdepartmental Code 185-5331).
2. The steps taken by Air Force were as follows:
 - (a) They obtained information on steps taken by Agriculture.
 - (b) A list of eligibles was prepared.
 - (c) A list of eligibles in each of the twelve field installations was forwarded to the field, asking for nominations that would not in any way be detrimental to operations.
 - (d) Each case was reviewed and discussed before it was included in the program.
 - (e) Briefing material, including viewgraph transparencies, were prepared and sent to field installations. There were three kits, one for supervisors, one for candidate retirees, and one for labor unions. (The reception from the unions was very good.) In the kit was a sample letter to the candidate, a narrative for the briefer, and a form on which to report to Headquarters the results of the experiment.
3. Briefing materials went to the field three weeks ago; they have been well received without exception. One feature of the agreement is a request that the retiree signify his intention to return or not on the 1st day of the 11th month.
4. Present Air Force System Headquarters views on the plan are optimistic. They do not expect the phenomenal results obtained by Agriculture, but feel that no more than 10% will elect to return; this was "just a guess, of course." The plan is seen as a distinct aid to the Command at this time when they feel acutely a squeeze in both manpower because their head count is too high, and in savings, because in many activities they have "just run out of money."
5. Mr. King is sending us materials used in his Command. In addition, he has offered to provide a briefing for us either at Andrews Air Force Base or at CIA.

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